

# Village of Butler Strategic Planning



**Introductory Meeting**

**May 1, 2019**

**1:00 pm to 1:45 pm EST**

Walter Jankowski  
reinvention consultant  
608 · 225 · 8219  
walter.jankowski@gmail.com

BETTER  
**DASH**  
FASTER  
CONSULTING



- Name
- Role
- *Why plan? Why now?*
- *What would you like to get out of this process?*



# Today's Objectives / Agenda



## Agenda

- I. Welcome and Introductions
- II. Background
- III. Overview of Proposed Strategic Planning Process (Walter)
- IV. Example Deliverables (Walter)
- V. Next Steps

# Better Dash Faster, LLC Core Competencies



## Business Consulting Services

- ❑ Strategic Planning & Execution
- ❑ Building *Centers of Excellence*
- ❑ Program Management
- ❑ Project Management
- ❑ Vendor Partnerships

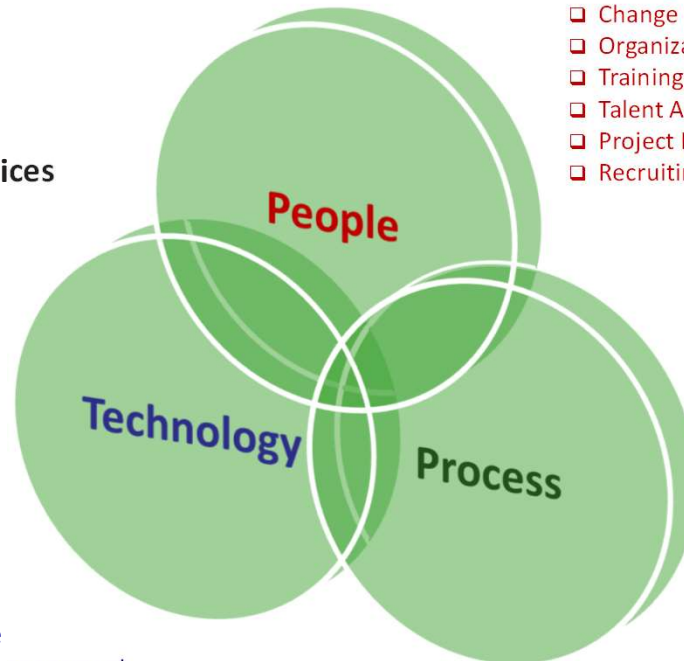


**Walter Jankowski**  
reinvention consultant  
608 · 225 · 8219  
walter.jankowski@gmail.com

BETTER  
**DASH**  
FASTER  
CONSULTING

## Technology

- ❑ Application Development
- ❑ Service Oriented Architecture
- ❑ Database development and management
- ❑ Web/ Internet development
- ❑ Systems development and management
- ❑ ERP / PDM / CRM Implementation, Migration
- ❑ Network administration and support
- ❑ E-commerce and e-business



## People

- ❑ Change Management
- ❑ Organizational Design
- ❑ Training
- ❑ Talent Assessment
- ❑ Project Resourcing
- ❑ Recruiting / Staffing

## Process

- ❑ Business Process Management
- ❑ Roles and Responsibilities
- ❑ Business and IT Requirements
- ❑ On-line SharePoint Documentation
- ❑ Staffing Models
- ❑ Metrics

# Clients



LANDS' END



# Background



- RFQ sent out February 6, 2019



GET AROUND BUTLER

SEARCH THE VOB SITE



GOVERNMENT SERVICES COMMUNITY BUSINESS I WANT TO...

## Community



12621 W. HAMPTON AVENUE

Butler, WI 53007-1791



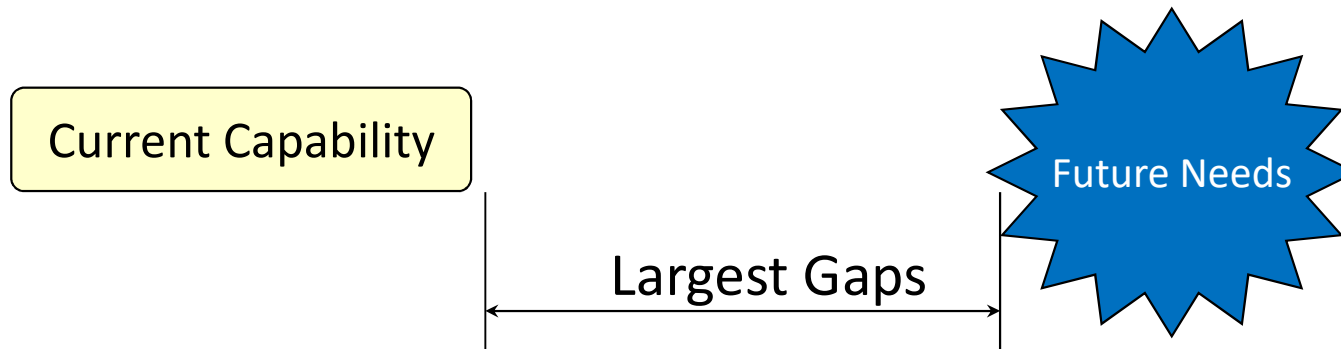
Village of Butler  
Request for Qualifications and Proposals  
Consultant Services  
Strategic Plan Creation

Submissions Due: 10:00 AM (CDT), Friday, March 8, 2019

Village of Butler Strategic Plan Creation RFP

1

# Vision and Long-Term Plan

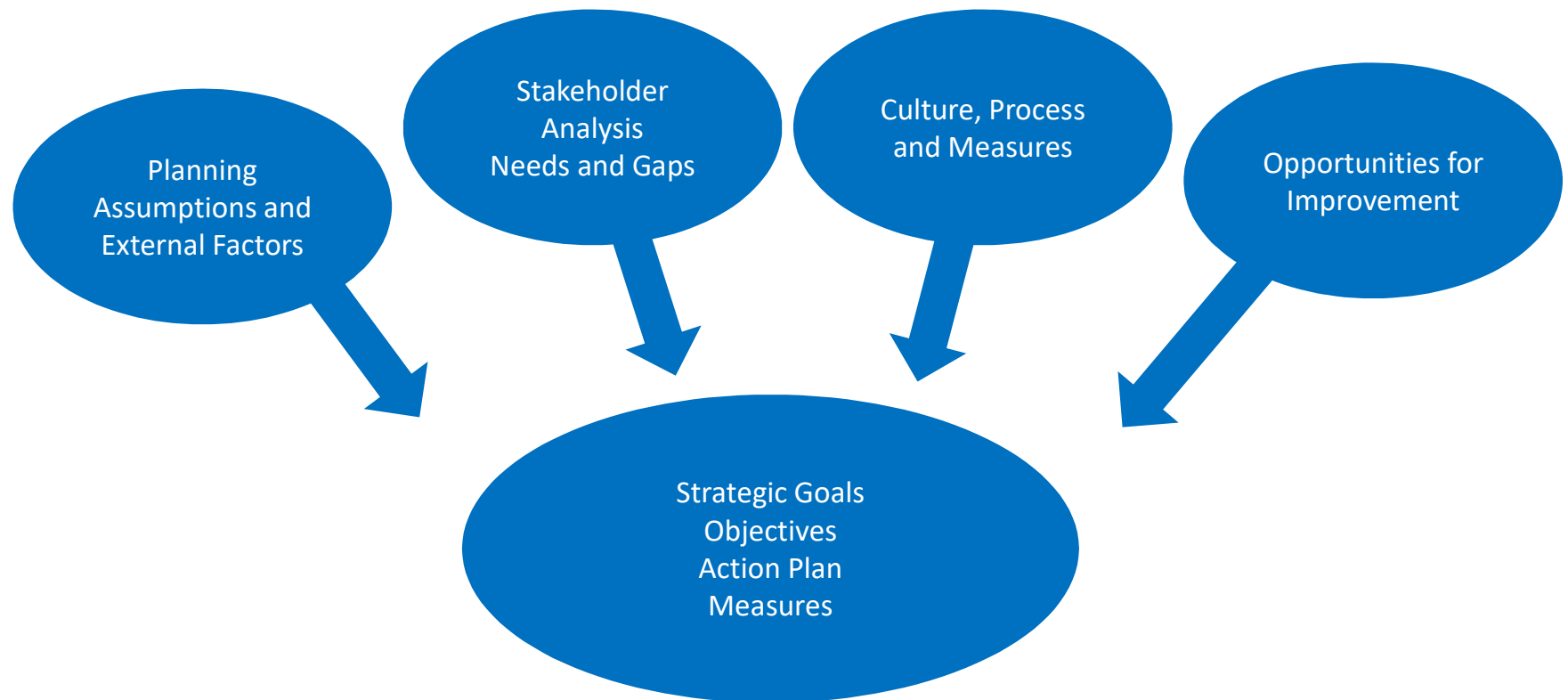


*The Strategic Planning Goals are the largest gaps between the most important future key customers needs and your current capability.*

- 1. Who are your key customers? (lead, target, etc.)*
- 2. What do they need?*
- 3. What is your current capability to meet the most important needs?*
- 4. What are your biggest gaps and what do we need to do to fill them?*



# Overview of Process





# Proposed Approach

Phase	Approach / Method	Output/Deliverable
Phase 0 <b>Finalize Scope, Approach, and Logistics</b>	<b>Scope / Outcome Definition Meeting – 30 min meeting</b> <input type="checkbox"/> Pre-meeting with Strategic Planning leadership to finalize strategic planning process and strategic planning participants. Finalize desired outcomes, deliverables and timeline.	<b>Deliverables:</b> <ul style="list-style-type: none"> <li>• Agreement on approach and logistics</li> </ul>
	<b>Proposed Facilitated Kick-off Session Agenda</b> <input type="checkbox"/> Welcome & Introductions <input type="checkbox"/> Comparing Waupaca to World Class <input type="checkbox"/> Discussion of Why This? Why Now? <input type="checkbox"/> Overview of Proposed Planning Process <input type="checkbox"/> Overview of Example Deliverables <input type="checkbox"/> Next Steps and Timeline <input type="checkbox"/> Q & A	
Phase I <b>Gather Pre-work Data</b>	<b>Pre-planning Department Head On-line Survey</b> All Department Head participants complete an on-line survey prior to strategic planning session. Survey would include: <input type="checkbox"/> Planning Assumptions and External Issues <input type="checkbox"/> Stakeholder's Analysis <input type="checkbox"/> Culture <input type="checkbox"/> Process Management <input type="checkbox"/> Performance Measures <input type="checkbox"/> Opportunities for Improvement / Priorities	<b>Deliverables:</b> <ul style="list-style-type: none"> <li>• Pre-planning survey results to Village Board</li> </ul>
	<b>Pre-planning Village Board Head On-line Survey</b> All Board members complete an on-line survey prior to strategic planning session using the Department Head survey results.	<b>Deliverables:</b> <ul style="list-style-type: none"> <li>• Pre-planning survey results to Planning Participants</li> </ul>

# Pre-Planning On-line Survey Deliverables



**Plateau Group Strategic Planning Survey Results**

**The Plateau Group**

ReInvention

Staff and Board  
Oct  
15  
5 Bo

**3. What are the top three planning assumptions we can make about the next two years? Write them as though it was a factual statement. We assume...**

**CRP and Regulation**

- That the CRP and other agencies will continue to be a detriment to business
- The CRP will continue to mandate changes that will negatively impact banking and insurance
- The CRP will continue to add requirements that will burden our customers and which will require additional compliance work from us
- Regulation and consumer advocate pressure will continue to increase
- The CRP & other regulatory will continue to cause loan industry consolidation
- The industry will have to fend off regulatory challenges
- CRP will continue to be problematic
- That the CRP will not create a problem on credit insurance
- Lending requirements will remain favorable for lenders

**Market**

- The economy will continue to limp along at a growth rate of less than 3%
- The economic atmosphere in the United States will be healthy
- Uncertainty will make bank market difficult

**Regins**

- Assets will continue to merge and be expanded
- The number of credit insurance and debt protection providers will continue to shrink, thus providing additional marketing opportunities for Plateau

**Modifications**

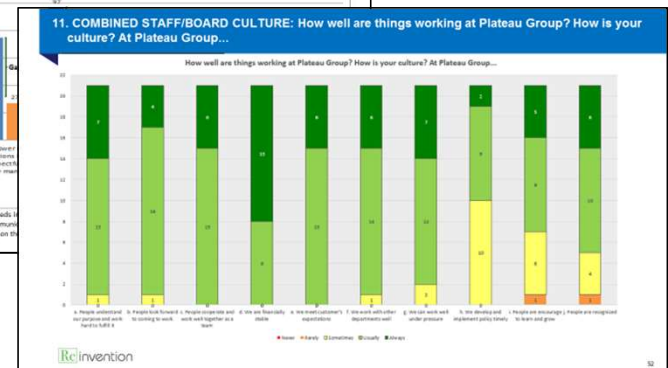
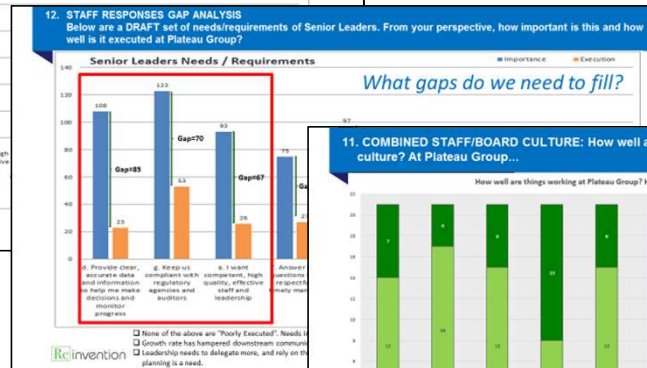
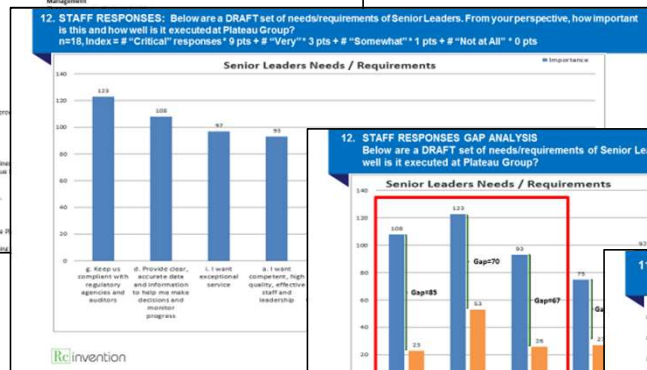
- We can grow gross (direct + assumed) premium numbers by 30% per year
- New gas and ancillary products are going to increase in the next 2 years
- That the need for non-traditional income streams will continue to grow
- Premiums will grow significantly from internal growth in existing product and new product line
- Plateau Insurance Company will have the ability to produce coverage of benefits and continue
- Plateau's growth has continued with organic products
- The company will continue to seek new revenue for its current lines of business
- New products are going to create significant growth within our company in the next 2 years

**Acknowledgments**

- Work on account efficiencies
- Monitor & grow existing accounts and add new accounts profitably
- Converting accounts from the companies we have taken over to our certificates will increase income
- We will be able to improve the quality of business in certain existing accounts through training

**Staffing**

- canceling poor producing accounts that will not or cannot work on increased production
- Staff growth has occurred to keep up with the growing business
- Train & develop existing associates and hire highly skilled associates in needed areas



# Proposed Approach



Phase	Approach / Method	Output/Deliverable
<b>Develop Strategic Plan</b>	<b>Strategic Planning Session</b> Proposed Agenda: <ul style="list-style-type: none"> <li>I. Welcome and Introductions</li> <li>II. Overview of Pre-planning survey results</li> <li>III. Validation of Planning Assumptions</li> <li>IV. Stakeholder Analysis</li> <li>V. Culture, Process, and Measures</li> <li>VI. Opportunities for Improvement</li> <li>VII. Consensus on Strategic Goals and Objectives</li> <li>VIII. Action Planning Around Strategic Issues</li> <li>IX. Key Performance Measures</li> <li>X. Validate / Update Mission, Vision</li> <li>XI. Timeline and Milestone Planning</li> <li>XII. Next Steps</li> </ul> <b>Finalize Plan – TWO 60-90 min session with Leadership</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Finalize Strategic Goals, objectives, action items, assignments, and measures</li> <li><input type="checkbox"/> Set-up monitoring, report out, and implementation planning systems</li> </ul>	<b>Deliverables:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> One page Roadmap</li> <li><input type="checkbox"/> One page Strategic Plan (Strategic Goals, Objectives, Success Measures)</li> <li><input type="checkbox"/> Detailed Strategic Action Plan with Goals, Objectives, Strategies / Actions, Assigned Owners</li> <li><input type="checkbox"/> DRAFT Key Performance Indicators (KPI's) and Dashboard</li> <li><input type="checkbox"/> Report Out Schedule</li> </ul>
<b>Report Out</b>	<b>Report out to Village Board</b>	<b>Report Out Meeting</b>
<b>Build Out SharePoint Site</b>	(OPTIONAL) If you have SharePoint	Strategic Plan SharePoint Site







## Charting the Course City of Oconomowoc

### Marketplace Realities

#### Changing Public Landscape and Expectations

- ☐ Changing business and public landscape
- ☐ Public will continue to expect higher levels of service
- ☐ Changes in legislation and mandates
- ☐ Technology changing needs and practices

#### Funding Constraints

- ☐ Stagnant State funding
- ☐ Rising fixed costs
- ☐ Limited staffing resources
- ☐ State imposed levy limits
- ☐ Little opportunity for new revenue sources

### Past/Current State

#### Our City

- ☐ Growing community
- ☐ Lack of major retail
- ☐ Available healthcare
- ☐ Safe and secure
- ☐ Access to natural resources
- ☐ Variety of events
- ☐ Residential and commercial opportunities
- ☐ Aging infrastructure

#### Process & Work Environment

- ☐ Lack of a united vision
- ☐ Resistance to change
- ☐ Challenging to attract and retain employees
- ☐ Strong competition for resources
- ☐ Reactive approach



### Future State

#### Our City

- ☐ Vibrant and diverse economy
- ☐ Destination for visitors, businesses and home buyers
- ☐ Enhance community safety
- ☐ Attractive for new corporate and tech headquarters
- ☐ Welcoming new retail and entertainment venues
- ☐ Culture of continuous improvement

#### Process & Work Environment

- ☐ Engaged and committed workforce
- ☐ Clearly established goals and vision
- ☐ Improved internal and external communications
- ☐ Prioritized use of resources
- ☐ Customer expectations are exceeded
- ☐ Adaptable to change
- ☐ Proactive approach

LIFE COMES  
*naturally*  
HERE



**Charting the Course  
City of Oconomowoc**

# Guiding Principles We Will.....

Teamwork

**We are one team, building community strength through collaboration**

Integrity

**We commit ourselves to the highest levels of ethical and professional conduct**

Excellence

**We aim to excel in all that we do and are dedicated to continuous improvement**

Communication

**We promote clear and open communication**

Creative

**We strive to be innovative and accept change as an opportunity to find better ways to accomplish our mission**

Safety

**We focus on the safety of our community and employees**

Accountability

**We take responsibility for our actions and follow up on our commitments**

LIFE COMES  
*naturally*  
HERE

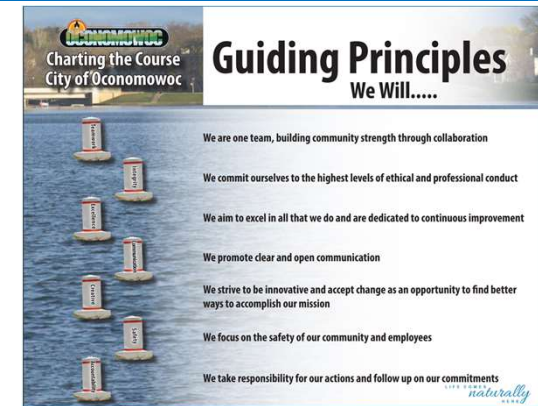
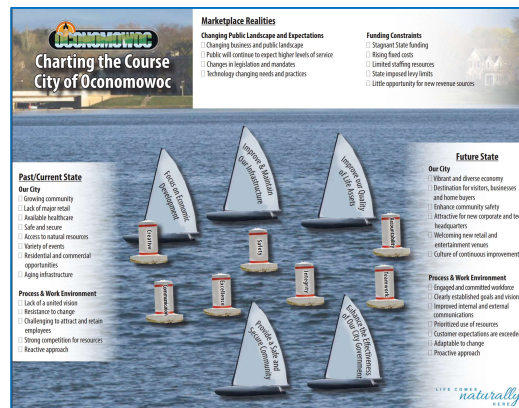


# Proposed Deliverables



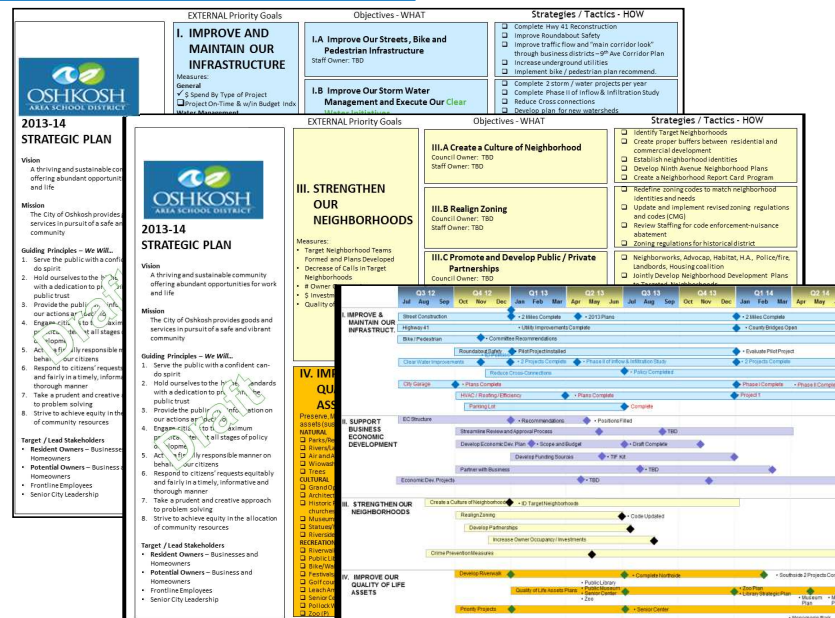
## 1. The Roadmap

- High-level One Page Summary
- Rotary Speech
- Laminated Card for Staff
- Posted on Internet



## 2. The Summary Plan & Timeline

- Summary High-level Plan
- Tree Diagram Format
- More Detail for Staff and Board
- Gantt Chart of Major Activities and Milestones
- Updated 1/4ly
- Posted on Internet / SharePoint







## 2019-2023 Strategic Plan

### Mission

Maintain a high quality of life by providing excellent service to our community.

Ensure safety and provide efficient, cost effective, high-quality services to our unique and growing Community

### Vision

Lake County's premier destination to live, work, and play.  
Oconomowoc, the best place to live in Lake County

### Guiding Principles

#### 1. Teamwork

We are one team, building community strength through collaboration

#### 2. Integrity

We commit ourselves to the highest levels of ethical and professional conduct

#### 3. Excellence

We aim to excel in all that we do and are dedicated to continuous improvement

#### 4. Communication

We promote clear and open communication

#### 5. Creative

We strive to be innovative and accept change as an opportunity to find better ways to accomplish our mission

#### 6. Safety

We focus on the safety of our community and employees

#### 7. Accountability

We take responsibility for our actions and follow up on our commitments

## I. PROVIDE A SAFE AND SECURE COMMUNITY

*Staff Owner: Ron Buerger / Joe Pickart / Kevin Freber      Future State: Public safety is paramount in all of the City's services*

- A. Maintain Quality of Police Services
- B. Provide Quality Fire and EMS Services
- C. Provide Reliable, High Quality, and Affordable Power
- D. Provide and Foster Safe and Clean Water

## II. IMPROVE AND MAINTAIN OUR INFRASTRUCTURE / FACILITIES

*Staff Owner: Mark Frye      Future State: Oconomowoc has a safe and effective infrastructure that provides a framework for optimal community enjoyment*

- A. Complete Public Safety Facility
- B. Maintain Our Existing Infrastructure
- C. Plan and Complete Road Extensions
- D. Identify Future New Projects, Timeline for Implementation and Funding Mechanism
- E. Plan for Continued Sustainability of Cemetery

## III. FOCUS ON ECONOMIC DEVELOPMENT

*Staff Owner: Bob Duffy      Future State: Oconomowoc is recognized as a premier community in Lake County by fostering an entrepreneurial spirit & tourism destination, developing and retaining a diverse mix of employees & employment opportunities, and revitalizing catalytic development areas*

- A. Research and Plan for Major Development
- B. Plan for Future Growth Areas
- C. Plan for Future Transportation

## IV. IMPROVE OUR QUALITY OF LIFE ASSETS

*Staff Owner: John Kelliher      Future State: Community members are proud of the natural, cultural and recreational assets of the City*

- A. Better Understand Our Citizen Needs, Wants, Expectations, and Priorities
- B. Plan and Implement Quality of Life Assets and Community Amenities
- C. Support Community Events and Opportunities for Residents

## V. ENHANCE THE EFFECTIVENESS OF OUR CITY GOVERNMENT

*Staff Owner: Laurie Sullivan      Future State: Our City is high-performing, efficient, effective and known for its service excellence.*

- A. Improve Our Planning Processes
- B. Recruit, Retain, Engage, Recognize and Develop Employees and Future Leaders
- C. Improve Our Technology
- D. Maintain/Improve the City's Financial Sustainability
- E. Improve Our Internal and External Communication
- F. Develop / Improve Our Performance and Outcome Measures
- G. Increase Partnerships



## 2019-2023 Strategic Plan

### Mission

Maintain a high quality of life by providing excellent service to our community.

Ensure safety and provide efficient, cost effective, high-quality services to our unique and growing Community

### Vision

Lake County's premier destination to live, work, and play.  
Oconomowoc, the best place to live in Lake County

### Guiding Principles

- 1. Teamwork**  
We are one team, building community strength through collaboration
- 2. Integrity**  
We commit ourselves to the highest levels of ethical and professional conduct
- 3. Excellence**  
We aim to excel in all that we do and are dedicated to continuous improvement
- 4. Communication**  
We promote clear and open communication
- 5. Creative**  
We strive to be innovative and accept change as an opportunity to find better ways to accomplish our mission
- 6. Safety**  
We focus on the safety of our community and employees
- 7. Accountability**  
We take responsibility for our actions and follow up on our commitments

Strategic Goal	Objectives - WHAT	Strategies / Tactics - HOW	June, 2018
<b>I. PROVIDE A SAFE AND SECURE COMMUNITY</b>  <i>Staff Owner: Ron Buerger / Joe Pickart / Kevin Freber</i>  <i>Future State: Public safety is paramount in all of the City's services</i>	A. Maintain Quality of Police Services	1. Implement Police Strategic Staffing Plan: Create implementation plan and report out– Ron Buerger 2019Q3 - Report out annually	
	B. Provide Quality Fire and EMS Services	1. Evaluate Fire District recommendation for future fire station – Laurie Sullivan / Ron Buerger – 2018Q4 2. Evaluate Fire District budgetary requests – Laurie Sullivan/Ron Buerger 2018Q3	
	C. Provide Reliable, High Quality, and Affordable Power	1. Replace street lighting with LED – 95% complete – Joe Pickart - 2019Q2 2. Convert overhead power lines to underground – 85% complete a. Identify future conversions and evaluate feasibility/timeline for work – Joe Pickart 2019Q1	
	D. Provide and Foster Safe and Clean Water	1. Evaluate triggers for replacing wells #1 and #2 – Joe Pickart – 2019Q4 2. Create plan for next city well – Joe Pickart – 2019Q4 (site acquired) 3. Continue implementation Oconomowoc Watershed Protection Program (OWPP) – report on program status second quarter annually - Kevin Freber 2019Q2 – Report out annually 4. Evaluate need for Wastewater Treatment Plant nitrogen removal upgrades – Kevin Freber - 2022Q2 5. Evaluate removal of lead pipes - Joe Pickart (900 services left) – update Council on lead laterals – 2018Q3	

# Proposed Deliverables



## 3. Detailed Strategic Plan

- Detailed Plan and Status Results
- Detailed Status
  - Green/Yellow/Red
  - Status Comments
- Updated for ¼'ly Status Reviews
- Includes Agenda 12 Month Plan
- Posted to Internet

**OASD Strategic Plan 2013-2016**

Task Name	Priority	Start Date	End Date	Current % Complete	Target % Complete
6.4 Assess and measure value of our quality measures by all community members	High	8/1/13	8/31/15	100%	100%
6.4.1 Develop an employee recognition program that will be started in 2013	Goal	8/1/13	8/31/14	100%	100%
6.4.2 Establish the leadership committee to develop this program	Action Steps	8/1/13	8/31/13	100%	100%
6.4.3 Select staff district wide from all level and groups to serve on committee	Tasks				
6.4.4 Develop program in other districts	Action Steps				
6.4.5 Evaluate and communicate the process	Action Steps				
6.4.6 Survey to entire OASD	Tasks				
6.4.7 Present ideas to BOC for approval	Tasks				
6.4.8 Meet with staff and employee representative groups to explore awards and nomination process	Tasks				
6.4.9 Review Committee submits award winners	Tasks				
6.4.10 OASD Develop a data based model to compare OASD programs to other districts for quality and effectiveness to start in 2014	Goal	8/1/13	8/31/15	100%	100%
6.4.11 Interview teacher compensation model consultants	Action Steps				
6.4.12 Select a teacher compensation model consultant	Action Steps				
6.4.13 Meet with selected consultant to review process	Action Steps				
6.4.14 Construct team members to participate in the process	Action Steps				
6.4.15 Team creates a double timeline consulting with a product for the 2014-2015 school year	Action Steps				
6.4.16 Determine if model review exists to accomplish goal	Action Steps				
6.4.17 Build a strong staffing and resource within schools to reduce non-teaching tasks and increase effectiveness to support student learning in the classroom	Goal	8/1/13	8/31/15	100%	100%
6.4.18 With help of principals at least meetings, identify what tasks are mandatory, optional and not necessary for Fall 2013	Action Steps				
6.4.19 Determine Task Force Meetings	Tasks				
6.4.20 Consult with area districts to review how schedules are determined	Tasks				
6.4.21 Identify areas where districts to review how schedules are determined	Action Steps				

**City of Oshkosh 2012-14 Strategic Plan and Results**

Council Meeting Week	Council Review	Topic / Activity / Milestone Review	Who	Comments
7/16/2012	Strategic Planning Session			
8/13/2012	Plan Review	Approve 2012-13 Plan	Mark	
8/27/2012				
9/10/2012				
9/24/2012				
10/8/2012				
10/22/2012				
11/5/2012				
11/19/2012	Quarterly Review	TBD		
12/3/2012				
12/17/2012				
12/31/2012				
1/14/2013				
1/28/2013				
2/11/2013	Quarterly Review			
2/25/2013				
3/11/2013				
3/25/2013				
4/8/2013				
4/22/2013				
5/6/2013				
5/20/2013				
6/3/2013	Semi-Annual Review	TBD		
6/17/2013				
7/1/2013	Update Plan			
7/15/2013				
7/29/2013				
8/12/2013	Plan Review			
8/26/2013				
9/9/2013				
9/23/2013				

## 4. Draft Measures

- Set of Measures
- Draft Board Scorecard

**Proposed Village of Butler Measures Balanced Scorecard**

Financial	Customer	Learning and Growth
<b>Spends / Revenue</b> <ul style="list-style-type: none"> <li>✓ \$ Spend vs Budget</li> <li>✓ \$ in TIF</li> <li>✓ \$ Property Value by Type</li> <li>✓ \$ Cost Recovery for City Programs (Rec, Parks, etc.)</li> <li>✓ \$ Property Tax Revenue as a % of General Fund Revenue</li> <li>✓ \$ TIF Spend / Residents</li> <li>✓ % of KPI TARGETS ACHIEVED</li> </ul> <b>Return on Investments</b> <ul style="list-style-type: none"> <li>✓ ROI on Economic Development Incentives</li> <li>✓ ROI on Special Events</li> <li>✓ \$ of Cost Savings (Projects)</li> <li>✓ \$ Investments in Improvements (Home and Business)</li> </ul> <b>City Financial Standing</b> <ul style="list-style-type: none"> <li>✓ Bond Rating</li> <li>✓ Number of Audit Findings</li> <li>✓ Operating Millage Rate</li> <li>✓ % of Net Bonded Long-Term Debt to Assessed Value</li> <li>✓ Direct Net Long-Term Debt per Capita</li> <li>✓ Net Operating Expenditures per Capita</li> <li>✓ Quick Ratio</li> </ul>	<b>Customer Satisfaction Survey (Business and Homeowners - Semi-Annual)</b> <ul style="list-style-type: none"> <li>✓ Overall Quality of Life</li> <li>✓ Quality of Neighborhood</li> <li>✓ Feel Safe Index</li> <li>✓ Population</li> <li>✓ Overall Quality of City Services (KPI)</li> <li>✓ Overall Customer Service Rating (KPI)</li> <li>✓ Residents' Value Rating (KPI)</li> <li>✓ Quality of "Cool Stuff To Do"</li> <li>✓ Quality of Communications</li> <li>✓ Likelihood of Recommending City to Others</li> <li>✓ Business Rating of City Efforts</li> <li>✓ Supporting Growth</li> <li>✓ Attracting New Businesses</li> <li>✓ Retaining Existing</li> <li>✓ Easy to Do Business With</li> </ul> <b>Customer Complaints Tracked By Department</b> <ul style="list-style-type: none"> <li>✓ Fire and Police</li> <li>✓ Crime Rate Incidents per 100,000 (KPI)</li> <li>✓ Crime Clearance Rate</li> <li>✓ Fractal Response in 8 min. or Less by Fire or EMS</li> <li>✓ Police Response Time</li> <li>✓ Accidents at Major Intersections (KPI)</li> <li>✓ Infrastructure Projects</li> <li>✓ \$ Spend by Type of Project (Street, Water, etc.)</li> <li>✓ Project On-Time &amp; Within Budget Index</li> <li>✓ Feet Status of Street (Paving, Closed, Completed) By Arterial/Collector</li> <li>✓ Street PAVES Rating</li> <li>✓ Water Incidents (KPI)</li> <li>✓ Total Time Closed per Foot of Street</li> <li>✓ Volume of Storm Water Capacity (KPI)</li> <li>✓ Feet of Sewer &gt; 70 Years</li> </ul>	<b>Learning and Growth</b> <ul style="list-style-type: none"> <li>✓ Employee Satisfaction (KPI)</li> <li>✓ Rewards and Recognition</li> <li>✓ Employees per 1,000 Residents</li> <li>✓ Sick Leave per 1,000 Hrs Worked</li> <li>✓ Workers' Compensation Claims per 100 Employees</li> <li>✓ Training Hours per Employee vs. Total Dollars Spent for Training</li> <li>✓ Recruitment Cycle Time</li> <li>✓ Supervisor Satisfaction with Recruitment</li> </ul>

# Best Practices in Tracking Your Strategic Plan



**Strategic Planning**

Strategic Planning

Home

Notebook

Documents

Pages

Recent

Strategic Plan Action Items

Site contents

Recycle Bin

EDIT LINKS

**MISSION**

1. Maintain a high quality of life by providing excellent service to our community

2. Ensure safety and provide efficient, cost effective, high-quality services to our unique and growing Community

**VISION**

1. Lake County's premier destination to live, work, and play

2. Oconomowoc, the best place to live in Lake County

**Guiding Principles**

1. Teamwork We are one team, building community strength through collaboration

2. Integrity We commit ourselves to the highest levels of ethical and professional conduct

3. Excellence We aim to excel in all that we do and are dedicated to continuous improvement

4. Communication We promote clear and open communication

5. Creative We strive to be innovative and accept change as an opportunity to find better ways to accomplish our mission

6. Safety We focus on the safety of our community and employees

7. Accountability We take responsibility for our actions and follow up on our commitments

**2019-2023 Strategic Plan**

**I. PROVIDE A SAFE AND SECURE COMMUNITY**

Staff Owner: Ron Buerger / Joe Pickart / Kevin Freiber Future State: Public safety is paramount in all of the City's services

A. Maintain Quality of Police Services

B. Provide Quality Fire and EMS Services

C. Provide Reliable, High Quality, and Affordable Power

D. Provide and Foster Safe and Clean Water

**II. IMPROVE AND MAINTAIN OUR INFRASTRUCTURE / FACILITIES**

Staff Owner: Mark Frye Future State: Oconomowoc has a safe and effective infrastructure that provides a framework for optimal community enjoyment

A. Complete Public Safety Facility

B. Maintain Our Existing Infrastructure

C. Plan and Construct Road Enhancements

**Guiding Principles**

We are one team, building community strength through collaboration

We commit ourselves to the highest levels of ethical and professional conduct

We aim to excel in all that we do and are dedicated to continuous improvement

- [City of Oconomowoc Strategic Planning SharePoint Home Page](#)



# Best Practices in Tracking Your Strategic Plan



- [City of Oconomowoc Strategic Planning Action Items Page](#)

# Best Practices in Tracking Your Strategic Plan



Action Item *	<input type="text" value="Implement Police Strategic Staffing Plan – Ron Buerger – Financial p"/>
Start Date	<input type="text" value="6/15/2018"/>
Assigned To	<input type="text" value="Ron Buerger x"/>
% Complete	<input type="text" value="50"/> %
Description	<div></div>
Action Item Status	<input type="text" value="In Progress"/> ▼
Status Comments	<div></div>
	No existing entries.
Department	<input checked="" type="radio"/> Police ▼ <input type="radio"/> Specify your own value: <input type="text"/>
Status Color	<input type="text" value="Green: On Track"/> ▼
Review with Council	<input type="checkbox"/>
Projected Completion Date	<input type="text"/>

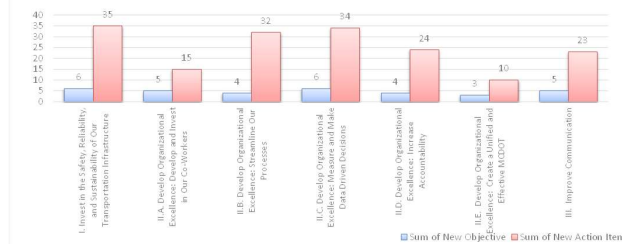
- [City of Oconomowoc Strategic Planning Action Items Page](#)

# Best Practices in Tracking Your Strategic Plan

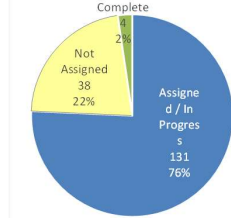


## 2017-2020 Strategic Initiative Progress Scorecard

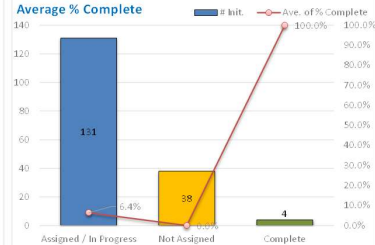
# of Strategic Objectives and Initiatives by Strategic Goal



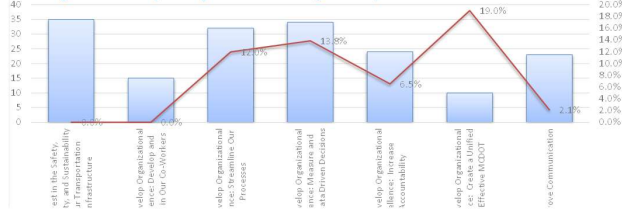
Strategic Initiatives by Status



# Strategic Initiatives by Status and Average % Complete



# Strategic Initiatives by Strategic Goal and Average % Complete

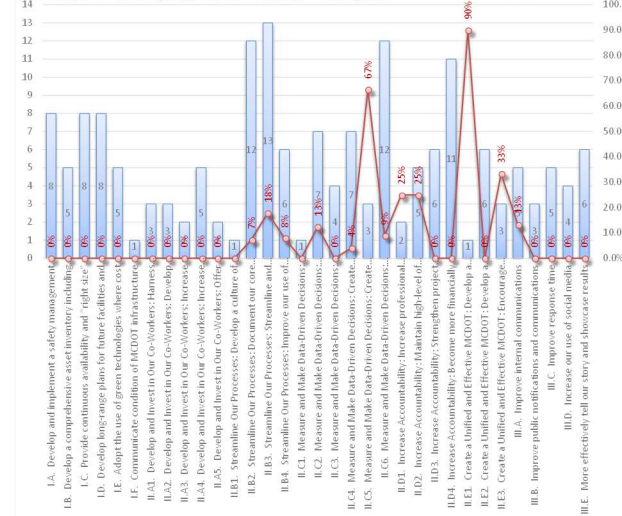


Report Run 2:17 PM 5/30/2018

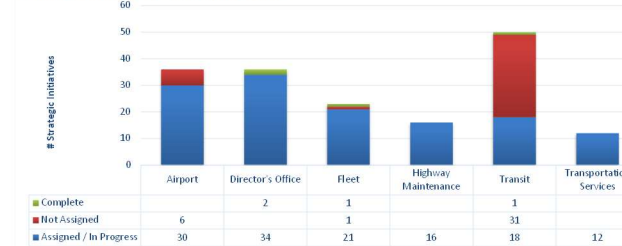
Page

## 2017-2020 Strategic Initiative Progress Scorecard

# Strategic Initiatives by Objective and Average % Complete



# Strategic Initiatives by Champion by Status





# Level 1: Strategic Plan Progress Measures



✓ Strategic Plan Entered Into Envisio

- **% Complete by Status of Plan**
  - On Track
  - Caution
  - Below Plan
  - No Update
- **% Complete by Goal**
  - Overdue
  - In Progress
  - Upcoming
  - Complete

## Strategic Plan Progress from Apr 01, 2017 to Jun 30, 2017



On Track 90.2%  
Caution 3.9%  
Below Plan 1.4%  
No Update 4.4%



Overdue 0.7%  
In Progress 95.4%  
Upcoming 1.0%  
Completed 2.9%

Total Assignment: 212

On Track: 193	Caution: 8
Below Plan: 1	No Update: 10

Total Strategies & Actions: 216

Overdue: 1	In Progress: 206
Upcoming: 2	Completed: 7

### Strategic Goal 1

SUPPORT ECONOMIC DEVELOPMENT Future State : Be recognized as a premier community in Wisconsin by fostering entrepreneurial activity, developing and...



On Track 97.6%  
Caution 2.4%



In Progress 100.0%

Total Assignment: 31

On Track: 30	Caution: 1
--------------	------------

Total Strategies & Actions: 31

In Progress: 31
-----------------

Objective: 6

Strategies & Actions: 31

# Questions





*What did you like, dislike, or learn today?*

## ABOUT YOUR FACILITATOR

### Walter Jankowski



**Walter Jankowski** has been a Consultant/Trainer for the last 15 years working with a wide-variety of insurance, financial, service, and manufacturing organizations. He currently is the owner and Reinvention Consultant at **Better Dash Faster, LLC**, a Madison consulting firm. You may ask, “*What’s a Reinvention Consultant?*” Walter helps senior leaders reinvent their operations by helping them figure out how to improve their organization’s performance.

Walter has facilitated and trained all over the State of Wisconsin, Minnesota and several international venues in performance improvement. He has extensive experience in developing leaders, developing and **implementing** strategic plans, and providing other organizational improvement services for businesses, governments, school systems, and not-for-profit organizations. He has also trained thousands of senior leaders, supervisory managers, and front-line workers in the principles of leadership, quality, continuous improvement and team development.

Walter earned his Masters Degree in Engineering from the University of Wisconsin-Milwaukee. He has been an active member of the Madison Area Quality Improvement Network, has been a senior examiner for the Baldrige-based Wisconsin Forward Award, and is also certified in Covey Training.

As an experienced trainer and facilitator, he has a unique blend of technical and interpersonal skills that make him successful in the specialized technical workplaces of today. Walter’s goal is to help organizations become more effective by helping to unleash the potential in everyone and utilize that wealth of knowledge for improvement.

## Walter Jankowski

reinvention consultant

608 • 225 • 8219

walter.jankowski@gmail.com

@WalterNvrFalter